

Clinical Dashboard for a Staff Member

Purpose

The Clinical Dashboard allows staff members to view their caseloads and to view Feedback from their clinical supervisor. All feedback is stored and tracked over time.

Locate the Clinical Dashboard

1. **Getting here:** The Clinical Dashboard is located on the navigation bar between the Group List and Client List.

User: Tester, Beta
Loc: SUD Administrative Agency, Test Facility
Client:

Printable View

MedlinePlus 15.5.1 Logout

Home Page
Agency
Group List
Clinical Dashboard
Client List
System Administration
My Settings
Reports

There is currently 1 person that has been referred in.
You have unread feedback; please go to the Clinical Dashboard to read feedback.

Home WITS Version : 15.5.1

Announcements

Summary	Posted Date	Start Date	Priority	Actions
The WITS Beta website can be used in any browser (Chrome, Firefox, etc.). However, because Chestnut is only supported by Internet Explorer, you must be in Internet Explorer when you use WITS to access the Chestnut site to edit or conduct GAINs.	4/28/2014 10:35 AM	4/28/2014	N	Review
Update: Access through the Idaho-Pacific site has been restored.	5/5/2014 10:10 AM	5/5/2014	H	Review

Data Elements on the Clinical Dashboard

There are eleven (11) data elements for each episode of care:

- Intake Date: This is the intake date of the specified episode of care.
- Client Name: This is the clients name as it appears on the Client Profile.
- GAIN Activity: This reflects the date of the GRRS download into WITS in the specified episode of care.
- Admission Date: This is the Admission date for the specified episode of care.
- Treatment Plan: This reflects the last Treatment Plan Start Date where the Tx Plan Status is “Active-Signed Off” or “Active-Note Signed Off” in the specified episode of care.
- Tx plan review due: This reflects the most current Tx Plan Review Due date for the specified episode of care.
- Modality: This reflects the treatment Modalities associated to the Program Enrollments that the client is enrolled in the selected episode of care.
- Last Encounter Date: This reflects the Start Date of the last Encounter Note in the specified episode of care.
- Discharge date: This reflects the Discharge Date if a Discharge has been complete on the specified episode of care.
- Case Closed: This reflects the Case Closed Date if the episode of care is closed.
- Primary Staff: This reflects the staff that has been designated as the primary staff on the specified episode of care based on the hierarchy of Primary Staff Set-up.

Clinical Dashboard Search

Intake Date Range From To

Case Status Clients with Open Cases Modality

Primary Staff Selected Staff Williams, Dennis

Clear
Go

Intake date	Client Name	GAIN Activity	Admission Date	Treatment Plan	Tx plan review due	Modality	Last Encounter Date	Discharge date	Case Closed	Primary Staff	Actions
4/26/2012	Mayhem, Martha		4/26/2012			Substance Abuse Outpatient (Non Intensive)	4/26/2012			Williams, Dennis	Provide Feedback
4/30/2012	Doosy, Debi		4/30/2012			Substance Abuse Outpatient (Non Intensive)	4/30/2012			Williams, Dannie	Provide Feedback

DATA
ELEMENTS

Viewing an Individual Client Record & Reviewing Feedback

1. Narrow the records to review on the Clinical Dashboard by entering **Intake Date Range From** and **To** fields, **Case Status** and **Modality**.

2. Click **Go**.

NOTE: Client activities highlighted in blue serve as a link that can be used to quickly navigate to that specific activity. Client activities highlighted in red are past due. Client activities highlighted in yellow have unread Feedback.

3. Click **Read Feedback** in the Actions column for the client record.

4. Change the Status field to **Read**.

5. Click **Save** and **Finish**.

Clinical Dashboard Search

Intake Date Range From To

Case Status Modality

Primary Staff Selected Staff

Intake date	Client Name	GAIN Activity	Admission Date	Treatment Plan	Tx plan review due	Modality	Last Encounter Date	Discharge date	Case Closed	Primary Staff	Actions
5/21/2012	Anderson, Betty		5/21/2012	5/21/2012	8/19/2012			1/1/2013	1/1/2013	003, Trainee	
9/12/2012	Booh, Sue		9/12/2012	9/12/2012	12/11/2012		9/12/2012	1/1/2013	1/1/2013	003, Trainee	
10/5/2012	Flintstone, Fred		10/5/2012	10/5/2012	1/3/2013		10/5/2012	10/5/2012	10/5/2012	003, Trainee	
12/24/2013	Belcher, Robert									003, Trainee	Read Feedback

Administrative Actions
[View Feedback Summary](#)

Feedback

This is feedback for my agency staff on this client.

Note

Client Name

For Staff

Status

Created by

Created date

Updated by

Updated date

Viewing the Feedback Summary Report

1. Click **View Feedback Summary** in the Administrative Actions box at the bottom of the Clinical Dashboard.
2. Enter the **Feedback Start Date**.
3. Enter the **Feedback End Date** and **Feedback Status** (these fields are optional).
4. Click **On Screen**.

NOTE: The Selected Staff defaults to the person logged into WITS.

NOTE: Hold the CTRL key on your keyboard down while clicking On Screen to bypass web browser security blocks. The Feedback Summary Report opens in a separate screen in PDF format.

10/4/2012	Anderson, Antoinette	3/5/2013			Substance Abuse Outpatient (Non Intensive)	
3/6/2013	Ackerson, Child	3/6/2013				
3/27/2013	Aaheim, Mary	3/27/2013			Substance Abuse Outpatient (Non Intensive)	3
4/24/2013	Anderson, Esmeralda	4/24/2013				4
4/29/2013	Aberdeen, Abby	4/29/2013			Substance Abuse Outpatient (Non Intensive)	5
5/6/2013	Ackerson, Abby	5/6/2013			Assessment, Substance Abuse Outpatient (Non Intensive)	5
8/1/2013	Ackerson, Susan	10/17/2013			Assessment	1
9/4/2013	Amaryllis, A	9/4/2013	9/4/2013	12/3/2013	Substance Abuse Outpatient (Non Intensive)	1

Administrative Actions
[View Feedback Summary](#)

Feedback Summary Report

Feedback Start Date: ← 2 Feedback End Date: ← 3

Feedback Status:

Staff: 4 Selected Staff:

FEEDBACK SUMMARY REPORT (3/1/2014 -)

STAFF NAME: 003, Trainee	SUPERVISOR NAME: 025, Trainee
Feedback Date: 03/24/2014 Client: A, Dean	Intake Date: 10/01/2011 Status: Read
Notes: This is a feed back note.	
Feedback Date: 03/24/2014 Client: Aardvark, Robert	Intake Date: 11/03/2013 Status: Unread
Notes: Tx plan is over due. please complete ASAP.	
Feedback Date: 04/21/2014 Client: Belcher, Robert	Intake Date: 12/24/2013 Status: Read
Notes: Feedback!!!!	
Feedback Date: 05/07/2014 Client: Belcher, Robert	Intake Date: 12/24/2013 Status: Unread